



POTRERO  
GROUP



# PARKS SUPPORT ORGANIZATION BUSINESS PLAN



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# EXECUTIVE SUMMARY

## Introduction

The natural, historical, and cultural features of California attract visitors from across the world and enrich life for nearly 40 million residents. Many iconic and beloved California places fall within the boundaries of federal, state, regional, and local parks. Decades of experience and the recommendations of the Parks Forward Commission tell us that government alone cannot give these parks what they need to best serve all visitors. Parks need partners. This plan, rooted in the Parks Forward Commission recommendations, describes the structure of an ideal partner to support California parks.

The need is clear. California parks have always relied upon local and federal government agencies, California native tribes, nonprofit groups, foundations, private companies, and local citizens to donate funds, expertise, and labor. It will take even greater collaboration and outside investment to address deferred maintenance, meet ongoing needs, and revamp the park experience to suit an increasingly diverse, young, urban, smartphone-dependent audience. The Parks Forward Commission (Commission), after a thorough review of the California state parks system, listed as a top priority the creation of a statewide, nonprofit, strategic partner with new resources to undertake projects in coordination with the California Department of Parks and Recreation (Department). The Department's own transformation efforts to modernize systems, processes, tools, and technology also recognized the need to build more and better alliances with community



and business groups, philanthropists, and others. Accordingly, the departmental reorganization now underway is structured to foster new partnerships.

The statewide parks support entity described here will complement and support the work of the Department and other park partners by attracting new public and private funding and expertise. It will promote the programs, amenities, and resources of state, regional, and local parks, with a focus on projects and programs in state parks. It will work to bring younger and more diverse visitors to parks and public lands. It will help ensure that these protected lands meet the evolving, lifelong needs of all Californians—whether that calls for playgrounds, bike trails, campgrounds, museums, or wilderness solitude. In doing so, this new support organization will promote health and well-being and foster a new generation of people who value parks. These concepts were reflected in law in 2016 (California Public Resources Code section 520, et seq.) to ensure vibrant and sustainable parks for all Californians and for present and future generations.

This parks support organization (PSO) business plan is based on a feasibility study for the development of a new parks support entity completed by Potrero Group in May 2017. It also draws heavily from a variety of common business model types and practices of comparable organizations, interviews with funders and nonprofit organization leaders, and a steering committee of park leaders, funders, and Department representatives.

## Business Model

### Overview

The PSO's business model synthesizes a strong project and program approach with an effective platform for philanthropic, public, and project-related funding. Initially, it will rely heavily on philanthropy and funds from projects. It will build credibility and momentum by demonstrating success.

The PSO will develop a memorandum of understanding (MOU) with the Department that will trigger a discussion about unmet needs and statewide priorities within California state parks. Together, the Department and the PSO, with input from stakeholders, will develop projects and programs that advance the priorities identified in the MOU. The PSO will support the implementation of the priorities as a coalition builder, fundraiser, conduit for philanthropic and public priority funding, and project implementer where necessary. The PSO will work with existing organizations to implement priorities and step in to manage implementation where no entity exists that can do so.

## Structure

The PSO will be established as a California nonprofit public benefit corporation exempt from income tax under Section 501(c)(3) of the Internal Revenue Code. It will be structured and staffed at a sufficient organizational capacity to match the scale, opportunities, and gravitas of California parks and to take full advantage of the opportunity to work with the Department.

The PSO headquarters will be located in Sacramento, either within or near the Department's offices.

## Board of Directors

The PSO's board of directors will reflect California's demographic and geographic diversity. Its members will include people with expertise in business and finance, parks, land management, education, communications, marketing, technology, natural or cultural resource management and interpretation, and citizen engagement, as well as the ability to contribute or raise funds. By statute, the board also will include the Department director and state director of finance as *ex officio* members.

## Staffing

PSO staffing will focus on building the organization's capacity for skilled leadership, complex project and program implementation, partnership building, and fundraising. Executive leadership will have skills commensurate with other leading institutions and will be compensated accordingly.

The hiring of a qualified executive director/CEO will be an essential step to launching the PSO. The board will oversee recruiting and selection of the executive. The board will consult with the Department on the executive hiring process, with final hiring authority vested in the board.

## Start-up Funding

The PSO will require philanthropic start-up capitalization of \$10M for a five-year period of initial growth and organizational development. Seventy percent of this funding will be allocated to operations, and 30 percent will go for priority projects and programs. Before launch, the PSO should secure 60 percent of its start-up capitalization to allow the organization to focus strategically on priority projects and organizational development and reduce the need to fundraise to support operations.

The start-up funding will enable the PSO to advance multiple significant priorities and successfully complete initial projects and programs. Public funding will not be used for PSO general operating expenses, but is expected to cover project or program execution expenses, with allocations for related project management expenses.

### Operating Revenue Drivers

Initially, start-up philanthropic funds will cover PSO operating costs. In the long-term, PSO operating revenue may benefit from a mixture of funding sources, such as philanthropic investment, project management-related revenue, and project- or program-focused public funding.

Earned revenue opportunities may present themselves as the organization develops and projects are realized. The board and executives will determine the PSO’s long-term revenue mix. The PSO will scale to future opportunities and priorities (or needed contractions in expenses).

### Initial Project Examples

Projects will be chosen in partnership with the Department based on an assessment of state-wide priorities reflected in the MOU. The MOU will articulate shared roles and processes and guide the PSO toward a consistent vision.

Initial project examples include, but are not limited to accommodation development, facilities rehabilitation and management, park access and transportation, and community engagement.

### Anticipated Success and Challenge Factors

While no single factor will determine the success or failure of the organization, these existing and emerging factors play important roles in the PSO business plan and the organization’s long-term potential.

SUCCESS FACTORS	CHALLENGE FACTORS
High-level mandate for the PSO	Initial reliance on philanthropic funding with no immediate fee-for-service attributes
Department is in a strong position to partner, identify statewide priorities, and coordinate with the PSO	Requirement for ongoing philanthropic investment
Projects currently awaiting execution creates a strong project pipeline	Need to build early success so that partners and funders see the value in the organization
Potential fundraising access	Political or state leadership changes
Strong relationships with other park partner organizations	Relationships with other park partner organizations will be time intensive to develop and nurture



## Launch Considerations

The PSO is positioned to launch in early 2018. The business planning process will be completed in January 2018 and fundraising and board recruitment can begin immediately. The board will initiate a search for an executive director/CEO beginning in Q1 2018 with the goal of having the position filled by Q2 2018. The executive director/CEO and board will work with the Department to finalize the MOU and identify statewide priorities that support mutual goals, objectives, and funding requirements. A public launch of the PSO will occur in the spring of 2018.

## Conclusion

The PSO will fill an important role by assisting the Department with pressing systemwide priorities. It will also help to amplify the vision and values of California's parks to a broader community, anchor the system as political administrations and priorities change, and welcome new supporters and constituencies. The PSO will help to grow overall support for parks rather than cut into existing resources, and expand the role parks can play in the lives of Californians and visitors.

# INTRODUCTION

In 2015, the Parks Forward Commission (Commission) recommended the creation of a new nonprofit organization to support California parks. The Commission envisioned that the new support organization would support all parks and public lands within California, with a focus on projects and programs at state parks.

The Commission and the Department of Parks and Recreation (Department) provided strategic direction for a feasibility study completed for the proposed organization by Potrero Group in May 2017. A steering committee comprising the Department, Parks Forward Commissioners, key funders, and experienced park leaders provided guidance to Potrero Group's process. Conversations, interviews, and meetings with over 300 individuals with experience in state, regional, and national parks (including California State Parks Foundation, parks funders, and local and regional nonprofit partners) as well as Potrero Group's previous experience with public-private partnerships informed the study's findings and confirmed the need for a statewide park support organization in California. The final report articulated the existing needs across the state and defined the core mission and functions for the proposed organization. This provided the groundwork for the development of this business plan.



The feasibility study identified the following opportunities for the organization to support California parks:

- **Fundraising and revenue generation.** The support organization and the Department should work together to support effective funding from philanthropy, corporate sponsorship, strategic alliances, and other sources of funding.
- **Capital projects planning and implementation.** There is a clear need to expand the capacity to complete large capital, renovation, and rehabilitation park projects. The new





organization could more nimbly support the mechanisms for both developing and following through with projects—and assist with capital fundraising.

- **Increasing access and building new audiences.** Every park partner is mindful of the need to increase access and better serve all Californians. A focus on new audiences and park access should serve as a lens for all of the support organization’s programs and projects.
- **Promotion of parks and public lands.** Previous research has indicated that the public pays little attention to park jurisdictional boundaries. A statewide organization would be in a strong position to help promote park use and access across jurisdictional boundaries through programs, partnerships, and projects with state, regional, and local park agencies, and tourism offices.
- **Private investment and business partnerships.** There is an opportunity to rehabilitate existing assets and expand visitor access through product development and creative business partnerships.

From this work, we confirmed the Parks Forward Commission’s recommendation that a nonprofit parks support organization (PSO) be formed to ensure vibrant and sustainable parks for all present and future generations of Californians. The PSO will help fulfill a vision of excellence for California parks and work with the Department to prioritize statewide needs. The PSO will facilitate implementation of the Commission’s recommendations and develop and secure expertise, services, and resources that are not readily available to California parks.

This document is meant to inform decisions for the development of the PSO by modeling business scenarios for the PSO. This report was informed by the steering committee after consulting numerous business models from successful organizations. These business models, combined with the informed advice of the steering committee and interviews with industry experts, formed the basis of the recommendation. Several iterations of the models allowed for refinement of the recommendations presented. Additional scenario analysis and financial modeling may be needed once an executive director/CEO is chosen and begins to establish a solid direction for the organization.

# BUSINESS MODEL TYPES AND COMPARABLE ORGANIZATIONS

## Business Model Types

The following table outlines common business models for park and public lands support organizations. The purpose of this categorization is to help build a common language for planning purposes. It is not exhaustive. In practice, most business models are a hybrid of these types—as demonstrated by the examples referenced in multiple categories below. Potrero Group recommends a combination of approaches for the PSO in this business plan.

**FIGURE 1: BUSINESS MODEL TYPES**

BUSINESS MODEL	REVENUE DRIVER	VALUE PROPOSITION	EXAMPLES
Earned Revenue	Fees for service such as management fees, retail, visitor services, and leasing	Provides high quality products and services that interpret the park, engage the public, and provide unrestricted funding opportunities	Golden Gate National Parks Conservancy, Tahoe Conservancy
Funds Management	Investment income and/or administrative fees	Manages endowments, mitigation and/or legal settlement funds, providing specialized financial expertise	National Fish & Wildlife Foundation, Center for Natural Lands Management
Member Association	Dues from member organizations	Advocates for and builds the capacity of its members	Public Lands Alliance, California League of Park Associations
Philanthropic	Contributions, often including a large public membership, which can be cultivated into major donors	Brings significant financial resources to projects and programs	National Park Foundation, Open Space Institute, Golden Gate National Parks Conservancy, Yosemite Conservancy
Project Management	Secures public and private funding to develop and complete projects, which include budget allocations to cover project staff and overhead	Implements projects, often leveraging public funds to attract more resources, and bring more expertise and capacity	National Fish & Wildlife Foundation, Golden Gate National Parks Conservancy

# High-Level Lessons from Comparable Organizations

While developing this business plan, Potrero Group researched the features of comparable organizations. From this research, Potrero Group synthesized core ideas, initial funding perspectives, and additional opportunities and organizational considerations. Three points stood out and significantly informed this business plan.

- **There is no one organizational model that fits the exact needs of the PSO.** Rather, the PSO's business model should utilize elements from several successful organizations in a combination unique to the opportunities and challenges facing California parks. Listed in Figure 2 below are key competencies (derived from examining the business models of other organizations) that will prove essential to the PSO's success.
- **Early projects and initial leadership strongly influence the long-term sustainability and effectiveness of organizations.** How organizations start influences how they endure. This does not diminish the essential role of long-term strategic thinking, accurate decision making, and appropriate staffing at all times, but the importance of a strong launch and initial actions was striking.
- **The relationship between the land agency director and the organization's executive director/CEO forms the foundation from which effective partnership and impact is built.** These relationships are critical, and collaborative planning and proximity of key personnel is essential to success.

A sampling of key aspects of the most relevant comparable organizations researched is included in Appendix B.

# BUSINESS MODEL

## Overview

The PSO's business model synthesizes a strong project and program approach with an effective platform for philanthropic, public, and project-related funding. It will build a strong project pipeline that demonstrates an effective value proposition through its partnership and problem-solving approach and close working relationship with the Department. The organization will rely heavily on project and philanthropic funds and will seek to demonstrate important ongoing impact in order to build credibility and maintain momentum.

The PSO will develop a memorandum of understanding (MOU) with the Department that triggers a discussion about unmet needs and statewide priorities within California state parks. Together, the Department and the PSO, with input from stakeholders, will develop projects and programs that advance the priorities identified in the MOU. The PSO will support the implementation of the priorities as a coalition builder, fundraiser, conduit for philanthropic and public priority funding, and project implementer where necessary. The PSO will work with existing organizations to implement Department priorities and step in to manage implementation where no entity exists that can do so.

### **HIGHLIGHT: YOSEMITE CONSERVANCY**

The Yosemite Conservancy (YC) is a fundraising organization resulting from a merger between the Yosemite Association (cooperating association and education partner) and Yosemite Fund (fundraising partner).

YC's example is a more typical park support model. It is funded in large part by contributions (86%) with individual memberships composing 68 percent of its total revenue. YC's management staff is located in San Francisco, close to funders but farther from the operations of the park. In contrast to the Golden Gate National Park Conservancy, this organization does less project execution alongside park management in favor of providing funding or expertise to projects being executed by park staff.

**FIGURE 2: PSO CORE COMPETENCIES**

COMPETENCY	APPLICATIONS	EXAMPLE
Coalition building and partnerships	Able to bring individuals and organizations together to execute programs/projects	Multiple funders, organizations, and park agencies working across jurisdictional boundaries
Deal coordination	Able to bring the right group of stakeholders to the table to initiate projects	Manage contracting and launch of a new project concept
Public finance and private philanthropic development	Able to work with the nuanced requirements of public and private financing and fundraising	Leverage private funds to supplement public funding for a priority project
Property development	Able to work on new or existing site development	Develop new park lodging options at a statewide scale
Project conception, design, implementation and management	Able to coordinate a project from vision through the various project phases to completion	Develop a new park site on donated property
Expertise in public lands administration and public contracting conditions	Able to operate effectively and support other organizations within state administrative and contracting requirements	Manage contracting for multiple partner entities who will receive public funding for a state parks project
Political sophistication	Able to work with public and private entities in a manner that builds relationships and streamlines process	Support priority projects and public funding

The PSO’s work will include projects whose key participants are public agencies, private funding organizations, project vendors, other landowners and businesses, and other park partners. The PSO will support and serve a variety of stakeholders which, among others, may include

- Local, state, federal, and tribal parks and protected lands agencies
- Other public sector agencies who may be involved in project coalitions or have specific jurisdiction
- Corporations who may be involved in project coalitions
- Nonprofit park partner and park supporting organizations
- Educational institutions
- Foundations and other entities and individuals who provide operating or project funding
- Communities adjacent to parks and public lands
- Park users and the general public

The PSO will be organizationally and operationally efficient, nimble, flexible, and partnership focused. The PSO will identify, structure, and execute priority projects and programs, including related coalition building, partnership development, relationship management, and fundraising.

The PSO will work with existing organizations to implement priority projects and step in to manage implementation only where no entity exists that can do so. As such, it will develop coalitions of funders, stakeholders, community members, and other organizations in the execution of priority projects and programs, at times actively developing and managing projects and programs. The PSO will maintain expertise in developing project budgets that cover all costs.

This business plan recommends a capitalization and staffing scenario that supports the PSO taking on projects at a comfortable pace, allowing for demonstrated efficacy and an early track record of success. Before launch, the PSO should secure 60% of the start-up funding identified for the first five years of the PSO's budget to allow the organization to strategically focus on priority projects and organizational development and reduce the need to fundraise to support operations.

Timely initial steps by a small, influential board of directors, including the early hiring of an executive director/CEO, are key to launching an organization that maximizes the opportunity to create a sustainable, robust parks support organization.

#### **HIGHLIGHT: GOLDEN GATE NATIONAL PARKS CONSERVANCY**

The relationship between the Golden Gate National Parks Conservancy (Conservancy), the philanthropic partner to the Golden Gate National Recreation Area and the Presidio Trust, is often mentioned as a model for the new support organization. Since its inception in 1981, the Conservancy has generated more than \$500M in support to its partners, developed thousands of products that support parks, and established a marketing and branding presence that has raised the visibility of parks and garnered national and international awards. The Conservancy's unrestricted funding from retail and visitor service revenue, specifically from services provided at Alcatraz Island, is an important driver of its overall park support efforts. This consistent funding provides the flexibility to innovate, take risks, and grow rapidly when an opportunity presents itself (such as constructing and operating a new visitor center at the Golden Gate Bridge for its 75th anniversary).

The Conservancy provides the park value with its ability to both fundraise for and manage large-scale trails and construction projects. Through cooperating agreements, the Conservancy is able to combine public and private funds and manage park projects through to completion. The organization has an in-house Projects Team that contracts with designers and architects, oversees construction, and works hand in hand with NPS to ensure compliance with NPS guidelines and federal statutes. Accomplishments include the Land's End Coastal Trail and Lookout, Golden Gate Bridge Welcome Center, coastal trails at Muir Beach, Pirates Cove, and the Presidio, and wayfinding signage park-wide—just to name a few. The Conservancy builds project staff and administrative costs expenses into its project budgets. The Conservancy also adds significant value and capacity to the park through staff exchanges with NPS, facilitated through an Interagency Personnel Agreement (IPA).

## Structure

The PSO will be created under California law as a nonprofit public benefit corporation and will be exempt from federal income taxation under Internal Revenue Code section 501(c)(3). It will be structured and staffed to ensure a sufficient organizational capacity to match the scale, opportunities, and gravitas of California parks and to take full advantage of the opportunity to work with the Department.

The PSO will include a board of directors, executive director/CEO, senior executive leadership, and management and support staff relevant to the scale of the organization's programming needs and funding sustainability.

The PSO headquarters will be located in Sacramento, in offices located within or near the Department's offices. This proximity to the Department and state leadership will allow for regular in-person coordination and collaboration, as well as strengthening partnership development and information sharing. A satellite office will be established in Los Angeles to provide fundraising support and a consistent presence in Southern California. Other regional offices may be opened as dictated by activity, fundraising, or organizational need.



## Board of Directors

The PSO will start with a small initial board of directors who will manage the organization's launch, hire an executive director/CEO, and support early fundraising, projects and programs, and partnership efforts.

Board membership will reflect California's demographic and geographic diversity. Its members will include people with expertise in business and finance, parks, land management, education, communications, marketing, technology, natural or cultural resource management and interpretation, and citizen engagement, as well as the ability to contribute or raise funds. By statute, the board will also include the Department director and state director of finance as *ex officio* members. Board members will serve fixed duration terms, which may be renewable within term limits imposed by the PSO's bylaws.

# Staffing

Staffing will focus on building the organization’s capacity for skilled leadership, complex project and program implementation, partnership building, and fundraising. Executive leadership will have skills commensurate with other leading institutions and will be compensated accordingly. Figure 3 provides a recommended staffing and compensation scenario that should help guide the early years of the PSO.

Key to the PSO’s launch and sustainability is the hire of an experienced, partnership-focused executive director/CEO who can guide the PSO through its early development and build toward its long-term growth.

The executive director/CEO will build an initial team that will include staff focused on development, communications, external relations (to work with agencies, the California Legislature on funding for statewide priorities, key local and regional partners, and coordination with the Department), project and program management, and an appropriate level of administrative support. Initial hires will focus on those roles that can add immediate value and core expertise to the PSO and support the organization’s early growth, sustainability, and projects.

**FIGURE 3: RECOMMENDED STAFFING AND COMPENSATION SCENARIO**

*(Base salaries are inflated by 3% annually and rounded to nearest \$1000)*

STAFF POSITION	2018 BASE SALARY	TOTAL COMPENSATION					TOTAL 2018-22
		2018	2019	2020	2021	2022	
Executive Director/CEO	250,000	305,000	314,000	324,000	333,000	343,000	1,619,000
VP for Development	165,000	201,300	207,000	214,000	220,000	227,000	1,069,300
VP for Operations	165,000	-	-	214,000	220,000	227,000	661,000
VP for Programs	140,000	170,800	176,000	181,000	187,000	192,000	906,800
Director of External Affairs	150,000	-	188,000	194,000	200,000	206,000	788,000
Director of Finance	140,000	170,800	176,000	181,000	187,000	192,000	906,800
Project Manager	135,000	-	-	175,000	360,000	371,000	906,000
Grants Manager	90,000	109,800	113,000	116,000	120,000	247,000	705,800
Accountant	80,000	-	-	-	107,000	110,000	217,000
Executive Assistant	70,000	85,400	88,000	91,000	93,000	96,000	453,400
Administrative Support	50,000	-	-	65,000	133,000	137,000	335,000
<b>Total Compensation</b>		<b>1,043,100</b>	<b>1,262,000</b>	<b>1,755,000</b>	<b>2,160,000</b>	<b>2,348,000</b>	<b>8,568,100</b>



The PSO will maintain substantial project and program development and implementation capacity and access to a diverse funding base. Staff growth in subsequent years will focus on increasing project and support staff in response to increased project portfolio, activity profile, and fundraising needs. The specific timing, focus, and pace of hiring will be at the discretion of the executive director/CEO and board.

## Start-up Funding

Start-up funding will come from philanthropic sources. The PSO will require start-up capitalization for a five-year period of initial growth and organizational development, as well as ongoing funding from multiple sources. Start-up funding is intended to support a decreasing percentage of operating expense over the PSO's first five years (see Figure 4).

Potrero Group recommends an initial start-up capitalization of \$10M, of which \$7M is allocated for operations and \$3M for initial projects and programs funding. It is also recommended that the PSO have 60 percent of the total start-up funding committed by the PSO's launch date. This sum equals \$4.2M of the \$7M recommended operational funding and \$1.8M of the \$3M recommended projects and program funding—a total recommended pre-launch funding commitment of \$6M. These funds would be utilized on approximately the schedule noted in Figures 4 and 5 below.

Initial start-up funding includes \$3M working capital for projects and programs, sourced from public and private sources. This funding allows the PSO to advance multiple significant priorities and complete initial projects and programs to demonstrate results. These funds are included in the model below as a component of start-up funding, though they are project funds. Any PSO operational funding from this source would be realized through project- or program-related staff and administrative costs and would be included in the standard project budgeting process.

**FIGURE 4: START-UP FUNDING SCENARIO**

START-UP FUNDING SUMMARY	2018	2019	2020	2021	2022	TOTAL 2018-22
Operations Funding	1,700,000	1,600,000	1,500,000	1,300,000	900,000	7,000,000
Projects and Programs Funding	-	500,000	500,000	1,000,000	1,000,000	3,000,000
<b>Total Start-up Funding</b>	<b>\$1,700,000</b>	<b>\$2,100,000</b>	<b>\$2,000,000</b>	<b>\$2,300,000</b>	<b>\$1,900,000</b>	<b>\$10,000,000</b>

## Operating Revenue Drivers

Long-term PSO operating revenue will come from a mixture of philanthropic investment, project management-related revenue, and project- or program-focused public funding. Together, these sources compose approximately 80 percent of total PSO revenue by year five. Revenue from corporate donations and other business activities accounts for the remaining 20 percent of PSO revenue within that time frame.

While significant earned revenue is a hallmark of many great organizations, the steering committee and Potrero Group recommend that in the first five years the PSO focus on projects and programs, build trust and credibility, and establish a strong track record to solidify the organization for greatest long-term impact. Earned revenue opportunities may present themselves as the organization develops and projects are realized, and it will be at the discretion of the board and leadership to determine the PSO's longer-term revenue mix. The PSO is designed to scale with future opportunities and priorities (or needed contractions in expenses).

**FIGURE 5: REVENUE AND EXPENSE PROJECTION SCENARIO**

OPERATING REVENUE	2018	2019	2020	2021	2022	TOTAL 2018-22
<b>GRANTS AND CONTRIBUTIONS</b>						
Start-up Funding	1,700,000	2,100,000	2,000,000	2,300,000	1,900,000	10,000,000
Annual Fundraising	-	400,000	900,000	1,200,000	1,500,000	4,000,000
<i>Subtotal</i>	<i>1,700,000</i>	<i>2,500,000</i>	<i>2,900,000</i>	<i>3,500,000</i>	<i>3,400,000</i>	<i>14,000,000</i>
Project and Program-Related Fees	-	100,000	250,000	650,000	1,000,000	2,000,000
<b>Total Operating Revenues</b>	<b>\$1,700,000</b>	<b>\$2,600,000</b>	<b>\$3,150,000</b>	<b>\$4,150,000</b>	<b>\$4,400,000</b>	<b>\$16,000,000</b>
<b>OPERATING EXPENSE</b>						
Staffing	1,043,100	1,262,000	1,755,000	2,160,000	2,348,000	8,568,100
Professional Fees	300,000	400,000	450,000	475,000	500,000	2,125,000
Office Expense	35,000	50,000	60,000	70,000	80,000	295,000
Travel and Meetings	25,000	40,000	50,000	60,000	70,000	245,000
Other Operating	200,000	250,000	275,000	300,000	325,000	1,350,000
Projects and Programs Pass-Through	-	500,000	500,000	1,000,000	1,000,000	3,000,000
<b>Total Operating Expenses</b>	<b>\$1,603,100</b>	<b>\$2,502,000</b>	<b>\$3,090,000</b>	<b>\$4,065,000</b>	<b>\$4,323,000</b>	<b>\$15,583,100</b>
<b>Net Operating Income</b>	<b>\$96,900</b>	<b>\$98,000</b>	<b>\$60,000</b>	<b>\$85,000</b>	<b>\$77,000</b>	<b>\$416,900</b>

While a fundraising feasibility study hasn't been undertaken for the PSO, many believe that the philanthropic opportunity for parks and environmental causes will remain strong. It is estimated that the total philanthropic market in the U.S. in 2016 was \$390B, of which \$11B was focused on environmental causes, an increase of seven percent over environmental giving in 2015 (Giving USA, 2017). Recently, the National Park Foundation raised over \$350M in support of national parks and park partners. Large philanthropic gifts have not been the hallmark of California's state parks, but this could change with the launch of the PSO if it quickly demonstrates the value it adds to the park community.



## Future Potential Revenue Drivers

While not a priority at launch, the PSO may have opportunities to consider the following funding mechanisms and tactics to further fund projects and programs:

- **Redevelopment or restoration of sites and/or facilities.** The PSO may manage the redevelopment or restoration of a site or facility, or lease sites or facilities under its authorized control for the same purpose.
- **Mitigation and tax credits.** Some projects may provide the opportunity to secure and leverage mitigation funding, new market tax credits, and/or other federal, state, and local tax credits. These opportunities are varied and intricate and will require staff expertise to realize. Operating revenue realized through these sources is often incorporated into the project budget. No operating revenue from this source has been anticipated in financial projections.

**HIGHLIGHT: NATIONAL FISH & WILDLIFE FOUNDATION**

National Fish & Wildlife Foundation (NFWF) works with 15 federal partners and more than 45 corporate and foundation partners to complete collaborative conservation projects, leveraging three dollars from private sources for every dollar of public funding. It also receives, manages, and disburses revenue from court settlements and other legal activities.

NFWF is supported in large part from collected management fees. When fundraising from private sources, the organization negotiates an unrestricted contribution (usually six to eight percent of the total cost) to help cover its operating costs. NFWF also negotiates fees for the legal settlement funds it manages on behalf of the Department of the Interior. All project funds from Fish & Wildlife Services (FWS), Bureau of Land Management (BLM), and National Oceanic and Atmospheric Administration (NOAA) are appropriated by Congress and go directly to projects—NFWF recovers no project management costs from these sources.

NFWF operates on a lean margin. Donors and corporate partners expect most of their investment to go directly toward projects. Both private funders and public agencies expect NFWF's overhead fees to be competitive with other nonprofits. NFWF covers most of its project management costs with fees, but not all of its operational overhead. Board giving and an annual fundraiser assist with these expenses.

## Initial Projects

The PSO will take a lead role in bringing public and private funding, project partnerships, and other key stakeholders together to execute priorities. Projects and programs will emphasize reaching new and diverse audiences and enhancing the visitor experience.

Early completion of high-priority, high-impact, and high-visibility projects and programs will help the PSO build a track record with partners that will increase its chances of ongoing success. These will be chosen in partnership with the Department based on an assessment of statewide priorities.

Working with the Department under an MOU that identifies shared priorities and articulates shared roles and processes will support a consistent vision and prioritization that advances the mission of both entities.

The following projects are representative examples of project types that the PSO may undertake.

### **Example 1: Accommodation Development**

Raise funds from a variety of sources and/or access low-cost financing to construct low-cost overnight accommodations throughout the state park system (e.g., cabins). The PSO will

manage the overall project to ensure public and private conditions are met and will often work in partnership with local organizations to manage installation of the accommodations at specific sites.

The PSO may fill the following roles in this example:

- Provide extra capacity to identify opportunities across the system.
- Develop viable funding plans and seek new partnerships for site improvements such as cabins, yurts, and other low-cost, low-maintenance accommodations.
- Serve as the project manager for site improvement projects.
- Seek and advance improvements in law, policy, and practice to increase the ability to effectively coordinate with key partners and stakeholders and ensure prompt project development and use.

### Example 2: Facilities Rehabilitation and Management

Design and manage renovations of an existing park asset and/or create new facilities to be used for new and expanded visitor services. The PSO will manage the project on behalf of the Department.

The PSO may fill the following roles in this example:

- Leverage public funds with private financing and lease options to develop, renovate, or rehabilitate an under-utilized park asset in a high-demand region.
- Work with the Department to create unique partnership opportunities for redevelopment projects that may involve long-term leases or subleases with the PSO and income-generating uses.
- Serve as the project manager for the renovation process and potentially manage the renovated facilities.



### Example 3: Park Access and Transportation

Address transportation issues limiting urban residents from safely or regularly accessing parks. This example would include the PSO bringing multiple funding streams and constituencies together to address a multi-jurisdictional challenge.

The PSO may fill the following role in this example:

- Leverage existing local and regional efforts to improve transportation and trip planning, especially targeting key local and underserved communities.
- Address transportation and parking issues in partnership with local transit partners and service providers.
- Support planning and communications to create new or expand existing means of transportation to parks.

### Example 4: Community Engagement

Support cross-jurisdictional community engagement that may involve development of new technologies, targeted outreach, and collaboration or program management.

The PSO may fill the following role in this example:

- Leverage new and existing data on park use and access to identify opportunities.
- Develop or leverage technology to improve the trip planning and visitation experience, especially targeting key local and underserved communities.
- Build coalitions across jurisdictional boundaries to increase collaboration and enhance the visitor experience.

#### HIGHLIGHT: NATIONAL PARK FOUNDATION

As the official charitable partner of the National Park Service, National Park Foundation (NPF) raises funds from individual donations as well as through organizational partnerships. NPF uses these funds to provide grants to national parks for specific programming around themes of protecting parks, connecting people to parks, and inspiring stewardship. NPF is a public-facing organization. It has developed high quality, systemwide marketing campaigns and formed corporate partnerships with companies like Coca-Cola, Subaru, and Ford. NPF cultivates major donors through its membership program.

NPF has worked hard in recent years to amplify the work of local park partners rather than competing with them for funding. It has demonstrated an ability to bring additional resources and attention to projects spearheaded by local and regional nonprofits—a likely role for the PSO.

## Anticipated Success Factors

The PSO has several key factors that are anticipated to contribute to its success in significant ways. While no single factor will determine the success of the organization, these factors play important roles in the PSO business plan and the organization's long-term potential.

- **High-level mandate for the PSO.** The Commission clearly identified the need for a robust statewide parks support organization. The California Legislature and governor supported this vision in law. The Department has worked to help ensure the successful focus, scope, and approach to partnership for the PSO. This high-level visibility coupled with new and proposed funding sources for parks will support the PSO's initial projects and fundraising.
- **The Department is in a strong position to partner, identify statewide priorities, and coordinate with the PSO.** The Department's recent transformation efforts have created an opportunity for effective project prioritization and partnership with the PSO. Department leadership is attuned to the need for close collaboration with a new PSO providing funding and services otherwise unavailable to the Department.
- **Project pipeline.** A strong backlog of ready projects has been identified across the state parks system, which provides the PSO with the potential for a significant number of high-profile projects.
- **Potential fundraising access.** With possible new public funding sources, continued support from the nonprofit and foundation partners who supported the Parks Forward Commission and Department transformation, and a statewide mandate, the PSO is well positioned to have significant access to funders at a level commensurate with the opportunity represented by California parks.



## Anticipated Challenges

The PSO has several challenges incumbent in its business model and organizational context. Each of these factors is surmountable through regular, professional leadership, management, and effective oversight. Highlighting these challenges allows them to be acknowledged, assessed, and actively addressed by PSO leadership.

- **Reliance on philanthropic funding and no immediate or exclusive fee-for-service model.** As outlined in this business plan, the PSO does not have an immediately available or exclusive source of fee-for-service or earned revenue. The PSO has been intentionally structured to rely on philanthropic funding in its early years to allow it to develop a track record of success and focus on priority projects. Project and program management revenue streams may develop over time as projects are completed and the organization establishes itself.
- **Requirement for ongoing philanthropic investment.** To sustain operations, the PSO will require consistent philanthropic investment to meet operating expense projections. While some revenue will be realized through project budgets, this income will likely not cover all operating expenses in any given year.
- **Need to build early success to help partners and funders see the value in the organization.** The PSO will need to launch with initial projects in the pipeline to maximize momentum and quickly build a track record of success.
- **Political administration and priority changes.** The PSO will need to develop resilience against changes in priority, funding, and focus produced by political administration transitions. This can be accomplished by building a strong track record of project success, securing long-term project stability through MOUs with the Department, and actively building relationships.
- **Relationship building with other park support entities.** Effective relationship building and proactive communication with local and regional park support organizations will help ensure close collaboration, leverage unique skills of partners, avoid conflicts, increase impact, and build long-term successful partnerships.



# LAUNCH CONSIDERATIONS

There are several key steps to complete in support of the PSO’s launch as a formal entity. These tasks and timelines are suggested to ensure that each step builds on the resources, capacity, and momentum established at every stage in the process. Launching the PSO on the accelerated timeframe outlined below will require a significant amount of nuanced work and outreach and should be undertaken by an entity capable of navigating the process with the Department, funders, and other stakeholders.

The business planning process will be completed in January 2018 and start-up fundraising and board recruitment can begin immediately. The board may want to explore fiscal sponsorship to facilitate grant applications and other fundraising prior to the launch of an independent 501(c)(3) organization. The board will initiate a search for an executive director/CEO beginning in Q1 2018 with the goal of having the position filled by Q2 2018. The board may want to consider hiring interim leadership or management to support the organization during the executive director/CEO search process. The executive director/CEO and board work with the Department to finalize a memorandum of understanding and identify state-wide priorities that support mutual goals, objectives, and funding requirements. A public launch of the PSO as an independent 501(c)(3) occurs in the spring of 2018.

**FIGURE 6: LAUNCH TIMELINE**

TASK	KEY CONSIDERATIONS	Q1 2018	Q2 2018	Q3 2018	Q4 2018
Complete planning	Steering committee and Department review				
Start-up funding	Application timelines; outreach				
Board recruitment	Small board focused on launch and funding				
501(c)(3) filing; incorporation; basic business capacities; facilities; logistics	Consider fiscal sponsorship, some form of incubation, or continued staffing similar to the Parks Forward Commission				
ED/CEO hire	Board coordinates search process; consider interim leadership during ED/CEO hiring process				
MOU with Department	Identify initial projects and develop implementation processes				
Launch event	Opportunities to privately and publicly launch the organization				
Initial staff hires	ED/CEO make key initial staffing hires for leadership, development, projects, and communications				

## CONCLUSION

California has the largest and most diverse state park system in the world. The Department admirably stewards these incredible assets with a network of dedicated partners. However, needs for funding and support capacity continue to grow and outstrip current capacity. A statewide organization with strong philanthropic and partnership competencies can help to fill this growing need. The time has come to launch this organization and drive California parks to new levels of excellence and impact.

The PSO will fill an important role by assisting the Department with pressing systemwide priorities. It will amplify the vision and values of California's parks to a broader community, anchor the system as political administrations and priorities change, and welcome new supporters and constituencies. The PSO will help to grow overall support for parks rather than cut into existing resources, and expand the role parks can play in the lives of Californians and visitors.

The level of interest and engagement with the PSO feasibility study and business planning process reflects the strength of the parks community in California. With a pool of talented and experienced leaders, an appetite for innovation, and a wealth of resources within the state, there is an incredible opportunity to meet the state's diverse park needs.



The PSO will serve California parks by filling a gap in the current parks support landscape. As envisioned, the PSO will leverage public and private funding to complete significant priority projects in partnership with state agencies, other organizations, and key local and statewide stakeholders. The PSO will be appropriately staffed to manage its project load and build the coalitions necessary to ensure project and program success. A sophisticated fundraising capability will be maintained to ensure long-term organizational and project sustainability. The PSO will be an entrepreneurial, flexible, consistent partner for the Department.

## APPENDIX A

# FINANCIAL SCENARIO TABLES

**FIGURE 3: RECOMMENDED STAFFING AND COMPENSATION SCENARIO**

(Base salaries are inflated by 3% annually and rounded to nearest \$1000)

STAFF POSITION	2018 BASE SALARY	TOTAL COMPENSATION					TOTAL 2018-22
		2018	2019	2020	2021	2022	
Executive Director/CEO	250,000	305,000	314,000	324,000	333,000	343,000	1,619,000
VP for Development	165,000	201,300	207,000	214,000	220,000	227,000	1,069,300
VP for Operations	165,000	-	-	214,000	220,000	227,000	661,000
VP for Programs	140,000	170,800	176,000	181,000	187,000	192,000	906,800
Director of External Affairs	150,000	-	188,000	194,000	200,000	206,000	788,000
Director of Finance	140,000	170,800	176,000	181,000	187,000	192,000	906,800
Project Manager	135,000	-	-	175,000	360,000	371,000	906,000
Grants Manager	90,000	109,800	113,000	116,000	120,000	247,000	705,800
Accountant	80,000	-	-	-	107,000	110,000	217,000
Executive Assistant	70,000	85,400	88,000	91,000	93,000	96,000	453,400
Administrative Support	50,000	-	-	65,000	133,000	137,000	335,000
<b>Total Compensation</b>		<b>1,043,100</b>	<b>1,262,000</b>	<b>1,755,000</b>	<b>2,160,000</b>	<b>2,348,000</b>	<b>8,568,100</b>

**FIGURE 4: START-UP FUNDING SCENARIO**

START-UP FUNDING SUMMARY	2018	2019	2020	2021	2022	TOTAL 2018-22
Operations Funding	1,700,000	1,600,000	1,500,000	1,300,000	900,000	7,000,000
Projects and Programs Funding	-	500,000	500,000	1,000,000	1,000,000	3,000,000
<b>Total Start-up Funding</b>	<b>\$1,700,000</b>	<b>\$2,100,000</b>	<b>\$2,000,000</b>	<b>\$2,300,000</b>	<b>\$1,900,000</b>	<b>\$10,000,000</b>

FIGURE 5: REVENUE AND EXPENSE PROJECTION SCENARIO

OPERATING REVENUE	2018	2019	2020	2021	2022	TOTAL 2018-22
<b>GRANTS AND CONTRIBUTIONS</b>						
Start-up Funding	1,700,000	2,100,000	2,000,000	2,300,000	1,900,000	<b>10,000,000</b>
Annual Fundraising	-	400,000	900,000	1,200,000	1,500,000	<b>4,000,000</b>
<i>Subtotal</i>	<b>1,700,000</b>	<b>2,500,000</b>	<b>2,900,000</b>	<b>3,500,000</b>	<b>3,400,000</b>	<b>14,000,000</b>
Project and Program-Related Fees	-	100,000	250,000	650,000	1,000,000	<b>2,000,000</b>
<b>Total Operating Revenues</b>	<b>\$1,700,000</b>	<b>\$2,600,000</b>	<b>\$3,150,000</b>	<b>\$4,150,000</b>	<b>\$4,400,000</b>	<b>\$16,000,000</b>
<b>OPERATING EXPENSE</b>						
Staffing	1,043,100	1,262,000	1,755,000	2,160,000	2,348,000	<b>8,568,100</b>
Professional Fees	300,000	400,000	450,000	475,000	500,000	<b>2,125,000</b>
Office Expense	35,000	50,000	60,000	70,000	80,000	<b>295,000</b>
Travel and Meetings	25,000	40,000	50,000	60,000	70,000	<b>245,000</b>
Other Operating	200,000	250,000	275,000	300,000	325,000	<b>1,350,000</b>
Projects and Programs Pass-Through	-	500,000	500,000	1,000,000	1,000,000	<b>3,000,000</b>
<b>Total Operating Expenses</b>	<b>\$1,603,100</b>	<b>\$2,502,000</b>	<b>\$3,090,000</b>	<b>\$4,065,000</b>	<b>\$4,323,000</b>	<b>\$15,583,100</b>
<b>Net Operating Income</b>	<b>\$96,900</b>	<b>\$98,000</b>	<b>\$60,000</b>	<b>\$85,000</b>	<b>\$77,000</b>	<b>\$416,900</b>

# APPENDIX B

## COMPARABLE ORGANIZATION SUMMARY

ORGANIZATION	STRUCTURES	COMPETENCIES	SUCCESS FACTORS	FUNDING	LEADERSHIP	CONSIDERATIONS
California Ocean Science Trust	State-authorized nonprofit (California Ocean Resources Stewardship Act)	Ocean science and stewardship  Multi-agency, multi-institutional partnerships	Consistent focus on core set of science-related issues related to mission  Expertise in grants and contracts as funding mechanisms	Ocean Protection Council (grants bonds/mitigation funds)  Philanthropic support  No direct appropriations	Enabling legislation directs board seats:  State agency representatives  University of California and California State nominations  Philanthropic leaders  Coast/ocean interest groups	Representational board members can impact decision making, vision, fundraising, and flexibility in unpredictable ways
Center for Natural Lands Management	Nonprofit headquartered in Southern California with satellite offices in CA and WA	Mitigation management, monitoring, restoration, and stewardship  Easements and compliance  Market-based conservation models, attracting private investment	Each property owned and/or managed has a Property Analysis Record (PAR), informing the creation of a management/stewardship/monitoring endowment to ensure perpetual protection  Current executive director brings high level of experience and partnership expertise (former COO at NFWF)	Portfolio of invested funds  Program service revenue (property management fees)	Board expertise:  Mitigation for land development  Conservation real estate  Biology  Natural resource management (gov't)  Media industry	Executive director and senior project staff with high-level expertise and skill contribute to success of organization
Deschutes River Conservancy	Nonprofit founded by a diverse set of local stakeholders: Central Oregon Irrigation District, Environmental Defense Fund, and Confederated Tribes of the Warm Springs Reservation	River restoration  Water management  Collaborative, consensus-based decision making	Collaborative approach to conservation  Can receive direct appropriations from Congress  Received federal appropriations for its first ten years	Philanthropic support  NFWF grants  State and federal grants  Hydropower mitigation  Consulting revenue	Trustees represent agricultural, tribal, environmental, recreational, municipal, fish & wildlife, and hydroelectric interests in Central Oregon  Make decisions by consensus  15 trustees, 10 staff	The right partnerships can raise local projects to state- or federal-level visibility

ORGANIZATION	STRUCTURES	COMPETENCIES	SUCCESS FACTORS	FUNDING	LEADERSHIP	CONSIDERATIONS
<b>Golden Gate National Parks Conservancy</b>	<p>Nonprofit cooperating association to the Golden Gate National Recreation Area</p> <p>Conservancy and GGNRA were founded at same time and co-located</p>	<p>Public-private partnership</p> <p>Project management and property development</p> <p>Visitor services and retail</p> <p>Stewardship and volunteerism</p>	<p>Operates high-traffic retail locations throughout GGNRA; these unrestricted funds give the organization flexibility to innovate and to grow</p> <p>Strong partnership culture at all levels of organization; matched at NPS</p> <p>Combines public and private funds for park projects</p>	<p>Philanthropic support</p> <p>Significant program revenue</p> <p>Cooperating agreements with NPS (pass-through)</p>	<p>Board expertise: corporate, civic leadership, media, branding, science, education</p> <p>Board associates: former board members who continue to contribute to the organization</p> <p>NPS attends board meetings <i>ex officio</i></p> <p>Founding ED leads organization</p>	<p>Earned revenue is critical for sustainability, flexibility, and ambitious scope</p> <p>Partnership culture should be embedded in the organization from its beginnings</p>
<b>National Fish &amp; Wildlife Foundation</b>	<p>Congressionally chartered nonprofit that manages mitigation funds and receives direct federal appropriations for projects via FWS, BLM, and NOAA budgets</p>	<p>Leveraging public funding with private sources</p> <p>Deal-making and partnership</p>	<p>Non-membership, non-advocacy position adds credibility</p> <p>Politically neutral and well-balanced board</p> <p>Low public profile, partners claim credit</p> <p>Doesn't compete with other foundations; has found a niche</p>	<p>Negotiates an unrestricted contribution (6%-8%) when matching funds from private sources</p> <p>Can sometimes recover administrative costs in cooperating agreements and when managing legal settlement funds</p>	<p>Trustees appointed by Secretary of Interior</p> <p>Includes FWS Director and NOAA Administrator, in addition to civic leaders</p>	<p>Demonstrated political and financial savvy build credibility</p> <p>Organizations that run on lean margin can be supported by management and administrative fees</p>
<b>National Park Foundation</b>	<p>Congressionally chartered nonprofit created to be the dedicated fundraising arm of NPS</p>	<p>Fundraising and corporate sponsorship</p> <p>Re-granting programs</p> <p>Building capacity of local park partners</p>	<p>Strong membership program; contributions are large majority of revenue</p> <p>Shift to coordinate fundraising campaigns with local and regional park partners</p> <p>Strong corporate funding partners</p> <p>Strong partnership with governmental partner</p> <p>Project implementation expertise</p>	<p>Philanthropic support</p> <p>Investment income</p> <p>Program services</p>	<p>Trustees appointed by Secretary of the Interior</p> <p>Secretary of the Interior and NPS Director serve <i>ex officio</i></p>	<p>In the past, NPF was sometimes seen as a competitor with local park partners; collaborative fundraising efforts that elevate partners' brands are helping to change perception</p>

ORGANIZATION	STRUCTURES	COMPETENCIES	SUCCESS FACTORS	FUNDING	LEADERSHIP	CONSIDERATIONS
North Carolina Parks and Recreation Trust Fund (PARTF)	Wholly-owned governmental fund created by legislature for park improvements  PARTF funds all capital projects, repairs, and acquisitions; appropriations cover state parks' operating costs	Sustainable park funding  Inter-governmental partnerships (cities and counties)  Coastal and waterfront access	Dedicated revenue stream from real estate tax  Visible improvements to park system	Percentage of real estate tax  PARTF allocations:  60% capital projects, acquisitions, park repairs  30% matching grants to local governments  5% grants to local governments for beach and waterfront access  5% grant administration	Parks and Recreation Authority administers the funds in accordance with legislation	Dedicated tax revenue can produce results for statewide priorities (such as increasing coastal access) and buoy state parks through economic crises
Open Space Institute	Nonprofit founded as a land trust that greatly expanded its mission over time to become a conservation strategic partner with philanthropy	Acquisitions and easements  Deal-making  Park improvements and access  Research and policy advocacy  Grantmaking and bridge loans	Diverse revenue sources  Long and distinguished track record	Philanthropic support  Investment income  Proceeds from sales of natural land areas and improvements  Payments from program-related investments and loans payable	Large board of trustees (29 members) supports the organization's varied programs and broad mission	Over time, an organization may increase its expertise and grow its programs to support an evolving theory of change
Sempervirens Fund	Nonprofit focused on redwoods protection in a specific geographic region	Acquisitions and easements  Leveraging public funding with private sources  Capital project implementation Stewardship	Flexible project-focused structure  Expertise working with state agencies	Philanthropic support  Public funding for projects  Investment income  Program revenue	Board expertise: biology, corporate, civic leadership, government, finance  Science Advisory Panel aids decision making	Specific geographic focus allows them to specialize and seek targeted funding
Yosemite Conservancy	Nonprofit charitable partner of Yosemite National Park  Merger of Yosemite Association (cooperating association and education partner) and Yosemite Fund (fundraising partner)	Fundraising for park projects and programs  Trail and habitat restoration  Visitor services and programming	Membership program: Individuals contribute 68% of the organization's total revenue  Located in Yosemite and in San Francisco (close to donor base)	Philanthropic support  License plate program  Retail and publishing  Visitor services and programs  Investment income	Board expertise: corporate, civic leadership, philanthropy  Board Council allows additional supporters and past board members to contribute to the organization	Membership program provides significant support and cultivates major donors

## APPENDIX C

# ACKNOWLEDGEMENTS

Potrero Group thanks the members of the Parks Support Organization Business Plan Steering Committee whose time, commitment, and expertise made this business plan possible and stronger.

Keali'i Bright, Deputy Secretary for Climate and Energy,  
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